



White paper for practice leaders

Increase Patient Reactivation, Retention, & Referrals By 33%

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Executive Summary

Most practices chase new patients while existing patients drift out of care. This weakens schedule stability, treatment follow through, and referral flow. A stronger growth model starts with the patients you already earned.

This paper outlines the operating changes behind a 33% increase in patient reactivation, retention, and referrals. The gain came from process correction, staff ownership, recall discipline, and better patient communication.

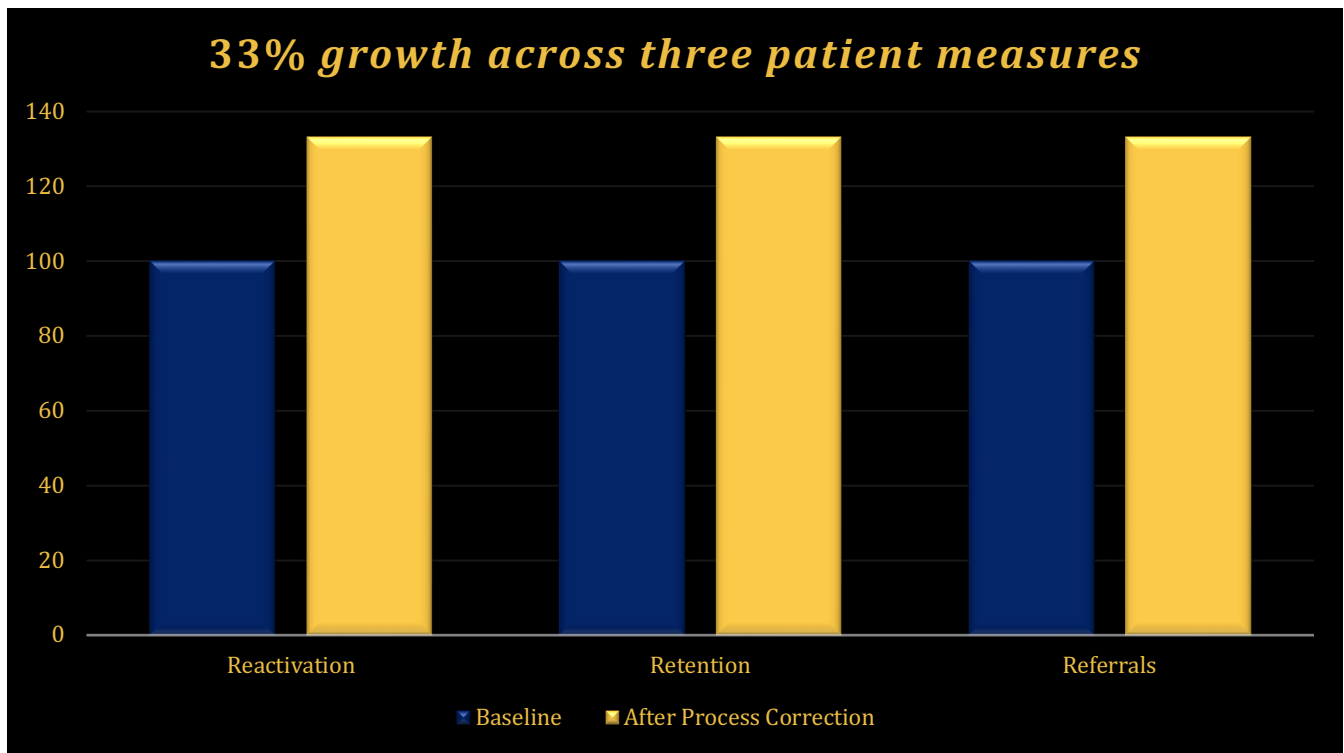


Figure 1. Indexed growth across three patient measures. Baseline = 100.

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Growth Problem

Patient growth breaks down in three places.

- Inactive patients receive little follow up.
- Current patients fall out of recall and treatment flow.
- Satisfied patients leave without a referral request.

These failures reduce production without drawing much attention. Your team stays busy, yet your practice keeps losing patients who already know your office and trust your care.

What a 33% Increase Means

A 33% increase in these three measures changes the full schedule.

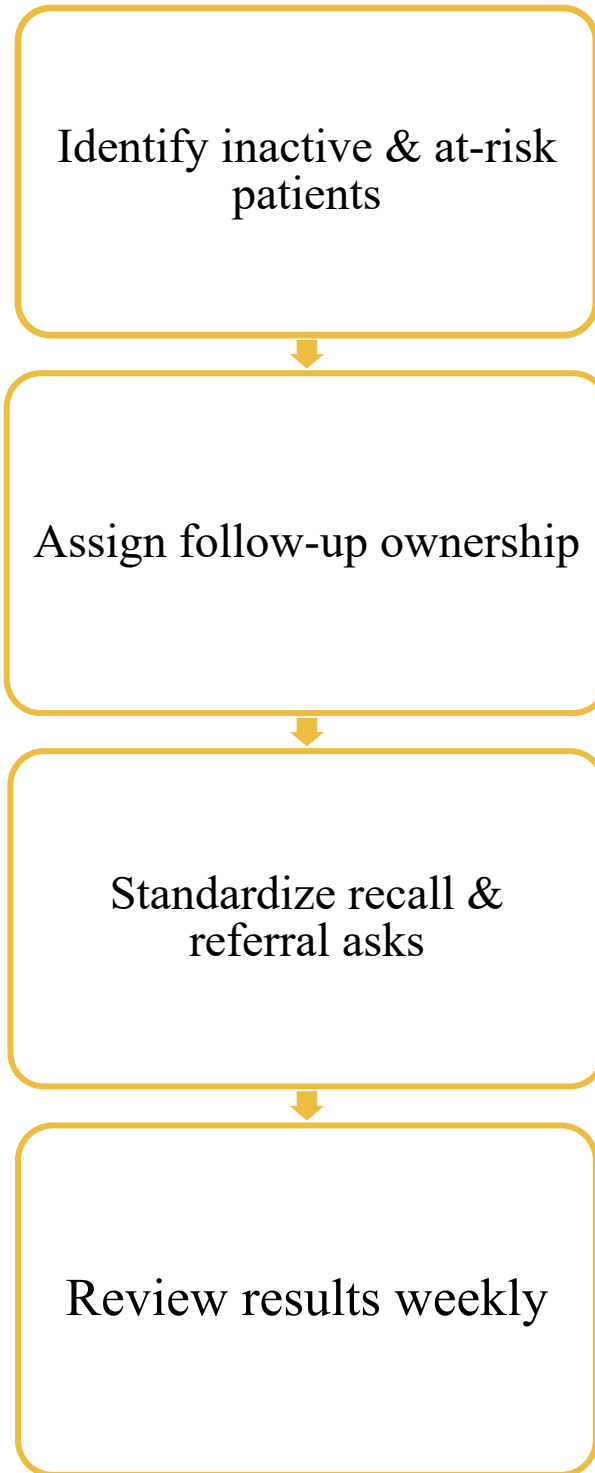
- Reactivation fills open time with patients who already know your practice.
- Retention keeps recall, hygiene, and treatment plans moving.
- Referrals add qualified new patients without extra marketing pressure.

This result did not come from one script or one campaign. The gain came from system design.

Where Practices Lose Patients

The review found repeat gaps across the patient journey.

Leak point	→	Effect on growth
Inactive patient lists	→	No one owns outreach, so patients stay dormant.
Recall due lists	→	Patients do not return on time, so retention drops.
Unscheduled treatment	→	Diagnosed care stays open and unscheduled.
Referral opportunities	→	Satisfied patients leave without a clear ask.
Reporting	→	Leadership sees volume, not leakage.



Changes That Drove the Increase

1. Reactivation received clear ownership

Named team members owned inactive patient outreach. Inactive lists became active call, text, and follow up queues.

2. Outreach timing improved

Patients heard from the practice while the visit, treatment need, or recall window still felt relevant.

3. Messaging became direct

The team told patients why they were due, what step came next, and how to schedule.

4. Recall discipline improved

The team confirmed next steps before the patient left. Open loops stayed visible until scheduled.

5. Referral generation moved into the workflow

The practice asked at the right point in the visit and tracked referral activity with the same discipline used for other patient follow up.

6. Leadership reviewed results every week

Weekly review kept pressure on execution and exposed drop off early.

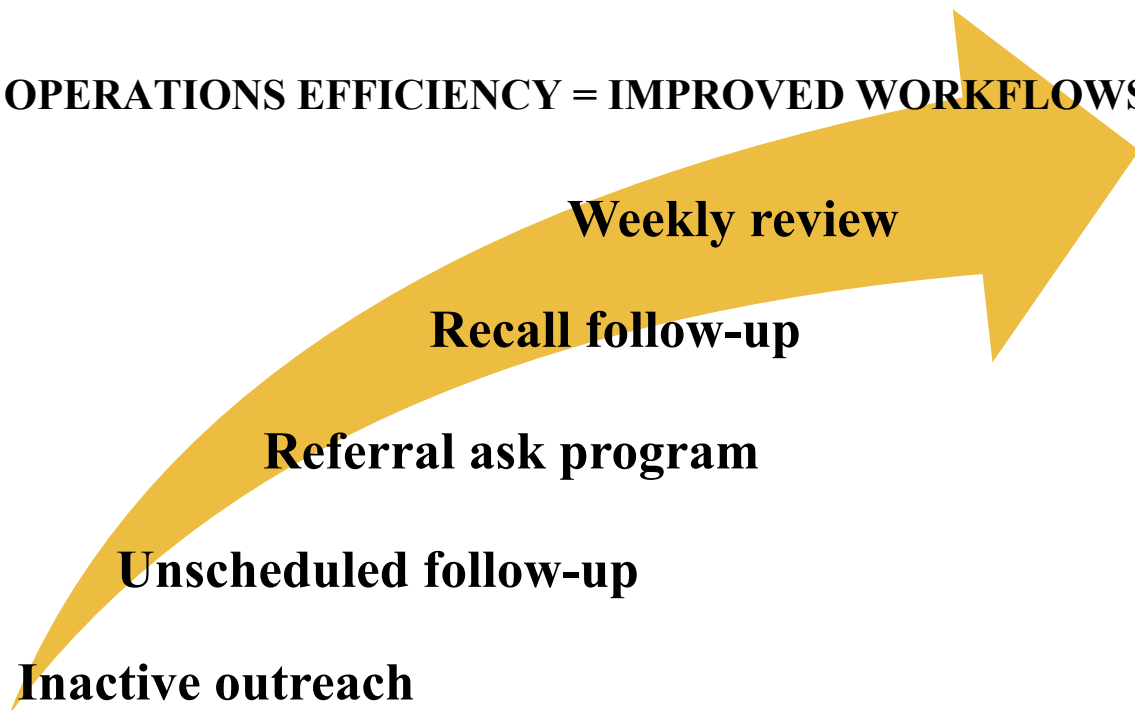
Management Metrics

If you want this type of result, track the right numbers every week.

- Inactive patients identified
- Inactive patients contacted
- Reactivation appointments booked
- Reactivation appointments completed
- Recall due
- Recall scheduled
- Unscheduled treatment value
- Follow up completed on unscheduled treatment
- Referral requests made
- Referrals received
- Referrals scheduled
- Referrals converted

Without these numbers, you are relying on feeling. With these numbers, you are managing performance.

OPERATIONS EFFICIENCY = IMPROVED WORKFLOWS



Business Impact

A 33% increase in reactivation, retention, and referrals affects more than volume:

- Schedule stability improves
- Revenue leakage drops
- Provider productivity rises
- Dependence on outside marketing falls
- The value of your current patient base rises

Action Plan for Practice Leaders

Start with your leakage points:

- Review inactive patient volume
- Review recall performance
- Review unscheduled treatment
- Review referral activity
- Assign ownership for each workflow
- Set response standards
- Train the team
- Measure weekly
- Correct fast

The main issue is rarely effort. The main issue is structure.

Closing Assessment

This 33% increase came from operating discipline.

Practices did not need more noise. The practices needed better follow through.

When you manage the patient relationship with more consistency, you recover lost revenue, keep more patients active, and create a stronger referral stream from the people who already know your practice.